Deltek Costpoint® 7.1.1

Deltek Resource Planning Integration EA

Release Notes

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Costpoint 7.1.1 Deltek Resource Planning Integration Overview

Costpoint 7.1.1 Deltek Resource Planning Integration provides you the ability to integrate employee, organization, project information between Costpoint and your Deltek Resource Planning installation. You can run the integration process through the Transfer Resource Planning Data screen in the Administration domain (**Administration** » **System Administration** » **System Administration Interfaces**) where the integration can be executed on demand. You can also opt to schedule to run the process at a certain time by using the Job Management applications in Costpoint.

The following Costpoint data is included in the integration:

Code Tables

The integration allows you to transfer various data codes from Costpoint tables to Resource Planning. This includes project types, general labor categories (GLC), labor location, employee suffix, state, country, education (degree), skill, skill level, skill years, and credentials (professional organizations/security clearance).

Organizations

The integration gathers records from the Organization (ORG) table in Costpoint for transferring to Resource Planning. You can opt to transfer all the organization records or you can specify ranges of organization information for processing by defining settings on the Configure Organization Options screen.

Employees

The integration gathers records from the Employee (EMPL), Salary Information and History (EMPL_LAB_INFO), and Employee Phone (EMPL_PHONE) tables in Costpoint for transferring to Resource Planning. You can opt to transfer all the employee records or you can specify ranges of employee information for processing by defining settings on the Configure Employee Options screen.

Projects

The integration gathers records from the Project (PROJ) and Customer (CUST) tables in Costpoint for transferring to Resource Planning. You can opt to transfer all the project records or you can specify ranges of project information for processing by defining settings on the Configure Project Options screen.

History

The integration allows you to transfer project historical hours in Costpoint to Resource Planning. Historical hours show the number of hours spent by each employee on each project and it also allows the calculation of Estimate at Completion (EAC) for each project.

Before you can run the data transfer to Resource Planning, you must enable the integration in the Deltek Configuration Utility. For more information, please refer to the steps in the Costpoint 7.1.1 – Deltek Resource Planning Integration Connection Settings section.

Pre-Installation Information

Minimum System Requirements

Ensure that the following are installed and operational:

- Costpoint Version 7.1.1

Application JAR Requirements

The following table shows the required application JAR version for each screen affected by this update:

Domain	Module	APP ID	Application Name	Application JAR
SC	SY	AOMVSEM	Configure Employee Options	cp711_aomvsem_001.jar
SC	SY	AOMVSOR	Configure Organization Options	cp711_aomvsor_001.jar
SC	SY	AOMVSPJ	Configure Project Options	cp711_aomvspj_001.jar
SC	SY	AOPRPDAT	Transfer Resource Planning Data	cp711_aoprpdat_001.jar

For Additional Information

Customer Care Connect Site

The Deltek Customer Care Connect site is a support Web site for Deltek customers who purchase an Ongoing Support Plan (OSP).

The following are some of the many options that the Customer Care Connect site provides:

- Download the latest versions of your Deltek products
- Search Deltek's knowledge base
- Display or download product information, such as release notes, user guides, technical information, and white papers
- Submit a support case and check on its progress
- Transfer requested files to a Customer Care analyst
- Use Quick Chat to submit a question to a Customer Care analyst online
- Ask questions, exchange ideas, and share knowledge with other Deltek customers through the Deltek Connect Customer Forums
- Subscribe to Deltek communications about your products and services
- Receive alerts of new Deltek releases and hot fixes

For more information regarding Deltek Customer Care Connect, refer to the online help available from the Web site.

Access Customer Care Connect

To access the Customer Care Connect site, complete the following steps:

1. Go to http://support.deltek.com.
2. Enter your Customer Care Connect **Username** and **Password**.
3. Click **Log In**.

If you forget your username or password, you can click the **Account Assistance** button on the login screen for help.

Costpoint 7.1.1 Enhancements

To support this integration, the following changes were applied to Costpoint 7.1.1:

Configure Employee Options (AOMVSEM)

- Added the **Deltek Resource Planning** option to the **Integration Type** drop-down list.
- Added **Resource Planning Options** which contain fields for indication Hours Per Day and Target Utilization user-defined fields.
- Added **Professional Org**, **Security Clearance,** and **Citizenship** fields on the selection tab.
- Updated screen layout.

Configure Organization Options (AOMVSOR)

- Added the **Deltek Resource Planning** option to the **Integration Type** drop-down list.
- Updated screen layout.

Configure Project Options (AOMVSPJ)

- Added the **Deltek Resource Planning** option to the **Integration Type** drop-down list.
- Added an **Apply Active/Inactive Filter On Top Level Projects Only** check box.
- Updated screen layout.

Transfer Resource Planning Data (AOPRPDAT)

A new screen, Transfer Resource Planning Data, was created in Costpoint (**Administration** » **System Administration** » **System Administration Interfaces**) to allow you to run the data integration process to Deltek Resource Planning. The data that you can transfer includes code tables, organization, employee, project and project historical hours from Costpoint.

Costpoint 7.1.1 - Deltek Resource Planning Integration Connection Settings

After you apply the required Costpoint System and Application JAR files, you must enable Resource Planning integration in the Costpoint Configuration Utility and enter the proper connection settings in order for Costpoint 7.0.1 Deltek Resource Planning Integration to work.

For more information on using the Costpoint Configuration Utility application, please refer to the *Deltek Costpoint 7.1.1 Configuration Utility* guide.

To configure the Costpoint – Deltek Resource Planning Integration connection settings, complete the following steps:

1. On your Costpoint application server, click **Start** » **All Programs** » **Costpoint 7.1.1** » **Start Costpoint 7.0.1 Config Utility**.
2. On the Select Your Configuration Options screen, make sure the **Costpoint Application Configuration** check box is selected and click **Next**. The check box is selected by default.
3. Open the Costpoint Configuration Utility and click **Costpoint** tab » **Resource Planning** tab.
4. Enter the Resource Planning Integration connection details in the following fields:
   - **Use Resource Planning Integration** — Select this check box to allow the integration.
   - **Resource Planning Web Service URL** — Enter the web service site that you will use for integration.
   - **User** — Enter the Resource Planning Admin user name.
   - **Password** — Enter the password of the Resource Planning Admin user.
   - **Confirm Password** — Re-enter the password of the Resource Planning Admin user.
   - **Database Name** — Enter the Resource Planning database name. This value should be exactly the same as the value entered when logging on to Resource Planning. For example, include spaces and special characters in the value.
   - **Client ID** — Enter the value entered in Resource Planning (**Configuration** » **Integrations & Imports** » **API Authorization** » **Client ID** field)
   - **Client Secret** — Enter the value entered in Resource Planning (**Configuration** » **Integrations & Imports** » **API Authorization** » **Client Secret** field)
   - **Number of Rows Per Call** – Enter the number of records (from **1** to **24999**) to be sent per call to the web service.
   - **Connection Timeout** – Enter the time in seconds for Costpoint to wait for a connection before a time-out occurs.
   - **Request Timeout** – Enter the time in seconds for Costpoint to wait for a response, after it sends a request, before a time-out occurs.
5. Click **Test** to check if the connection settings are correct.
6. Restart all WebLogic servers or run the Rebuild Global Settings screen in Costpoint to allow the changes to take effect.

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